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VIRGINIA DEALERSHIP GIVES 100 PERCENT

IMPLEMENT & TRACTOR

The Business Magazine of the Agricultural, Industrial & Outdoor Power Equipment Industry

VOLUME 105 No. 5 MAY 1990

Scott Nesbitt New I&T Editor

Scott Nesbitt, Lawrence, Kans., has been named editor of *Implement & Tractor* magazine, according to Tommy Keith, *I&T* publisher.

NESBITT

Nesbitt served as managing editor for *Implement & Tractor* from 1982 to 1986. Since then he has been copy editor for the Lawrence (Kans.) *Journal-World*.

During his previous stint with *I&T*, Nesbitt wrote features articles and was in charge of the *Manufacturers Edition*. He also helped coor-

(See NESBITT, pg. 19)

Air Controls Could Force Big Changes

By SCOTT NESBITT

ANTI-SMOG LAWS in California and political wrangling in Washington are painting a grim picture of the future for the off-highway machine business—everything from bulldozers and tractors to lawnmowers and chainsaws may have to be drastically changed to fit new emission control rules.

"Many dealers and farmers don't realize that the diesel engine may be outlawed by what the state's talking about doing," says Gene Feil, president of the Far West Equipment Dealers Association. His organization is urging members to write letters, mobilize their customers or do whatever they can to push

(See CLEAN, pg. 3)

GIL BRIDGES, manager of Hood Equipment Co., in Batesville, Miss., sees the gap narrowing between the equipment demands of the large acreage Mississippi Delta farmers and small hill producers, both of whom are served by the dealership.

Delta Vs. Hill Customer

Diversity Poses Challenge

By SCOTT MCCLURE

GIL BRIDGES can drive 10 miles to the west of Hood Equipment Company, the Case IH dealership he manages in Batesville, Miss., and find himself deep into the flat, agriculturally rich Mississippi River Delta.

If he goes 10 miles to the east of the dealership, he is in the heart of the state's hill country, where farms are considerably smaller and spread out over a greater area.

And although he believes the gap in the size of equipment being used by farmers in both areas is narrowing, knowing how to serve both the delta and hill customer, with their different needs and ways of doing business, is essential to the success of the dealership.

"Since I have been here, our business has probably been about 50-50 between the delta and hills," says Bridges, who came to Hood

(See DIFFERENT, pg. 8)

IMPLEMENT & TRACTOR
P.O. Box 1429
Columbia, MS 39614

Address Correction Requested

I T00262 9 OTHAAA49349S

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CONGRESS INFO SVC - STE 6
4520 EAST WEST HWY
BETHESDA MD 20814

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MAY 1990
VOL. 105, NO. 5

IMPLEMENT & TRACTOR
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Subscription information: Implement & Tractor is edited for persons in the farm and industrial equipment industry who function in the areas of retail sales and service, distribution sales and service, marketing, engineering, financing, manufacturing and general management. Subscription prices: U.S. and Canada one year — $15, three years — $30. Single copies, $3.50, except Annual Statistical Number, $4; Product File issue, $8; Red Book issue, $8. Extra charge for service on back issues. Allow 6-8 weeks for change of address and new subscriptions. Foreign subscriptions: Air Mail only available. One year — $100; three years — $250 (U.S. currency).

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ISSN 0019-2953 $3.50 + 0.00

IMPLEMENT & TRACTOR (USPS 461-750, ISSN-0019-2953) is published monthly, except combined November/December issue, by Farm Press Publications, P.O. Box 1420, Clarksdale, Miss. 38614. Second class postage paid at Clarksdale, Miss., and additional mailing offices. POSTMASTER: Send Form 3579 to P.O. Box 1420, Clarksdale, Miss. 38614.

Farm Press Publications
A Division of Argus Press Holdings, Inc.

CLEAN AIR

(From pg. 1)
enactment of a federal law blocking California's plan to impose off-road emission laws on Nov. 15, 1990.

The emission controls proposed by the California Air Resources Board (CARB) "could create severe equipment impacts which may include forcing some model machines out of production and others to bear substantial performance, reliability, weight and size penalties—possibly leading to several years of depressed new equipment sales" wrote John H. Crowley, director of engineering and safety programs for the Equipment Manufacturers Institute, which is taking the lead role in an industry-wide coalition that is attempting to work with California regulators while keeping a second front working to get Washington to stop the state from acting.

Of key importance to industry officials is how Washington deals with the issue of preemption—the federal government prohibiting individual states from adopting emission control laws that differ from a federally-developed national standard.

The first federal Clean Air Act, passed in 1967, preempted states from regulating automobile emissions. But the act included an exemption to preemption for any state that already had emission standards in place. California was the only state that qualified for the exemption, and for the last two decades automakers have built two kinds of cars—some for federal emission standards, the rest for California's.

The high volume of the car business made it feasible to build two levels of emission controls, but makers of tractors, bulldozers and other machines believe their sales volumes are too low to justify the added costs, should California be allowed to go its own way with emission controls. An even worse scenario: Development of separate emission standards by each of the 50 states and perhaps some of the cities and counties within them.

What's keeping some industry leaders awake nights is the fact that when the U.S. Senate earlier this year passed a clean air bill that carried support of both Democrats and Republicans, there was no provision for preemption. That moves the battle to the House, which is tentatively slated to vote on the bill in mid-May, and then send it to a House-Senate conference committee that could come back with a final package after the Memorial Day recess. If that package lacks preemption, industry's final hope would be that President Bush would veto the bill.

While waiting for the Washington action to unfold, machinery builders are trying to work with the California regulators. EMI is leading the effort with large-machine builders, while the Outdoor Power Equipment Institute is coordinating efforts in the lawn-and-garden and utility small-engine fields.

The situation at OPEI illustrates the frantic feeling in the industry. OPEI officials in the third week of April told member companies to show up at a May 3 meeting in Chicago, bringing along technical data on current emissions, the number of old engines now out in the field, information on current and future research into emissions, and anything else that might bear on the matter. But when they called the meeting, OPEI staffers weren't exactly sure when the industry would actually meet with CARB staff to discuss the issues.

"We were told it might be May 28 or later, maybe in the first week of June," said an OPEI staff member. "This whole thing caught us by surprise, and now it's rush, rush, rush, but wait, wait, wait. It's just a little maddening."

CARB public information spokesman Bill Sessa told I&T that manufacturers should not have been surprised by the recent surge of action by the state.

He noted that California started regulating emissions in the 1960s and CARB had, through the years, issued numerous policy directives affecting all manner of machines, along with pollution sources like factories and homes. When relevant portions of the federal Clean Air Act expired in 1987 and no replacement program was immediately proposed, he said, CARB converted its policy statements into a legislative package that was enacted into law as the California Clear Air Act of 1988.

Acting on those new laws, CARB set in motion a six-prong initiative to regulate all non-highway engine air pollution sources.

The first three categories were "heavy duty" vehicles over 40 horsepower; miscellaneous farm and construction machines under 40 horsepower, and utility engines such as those on garden tractors, lawnmowers, string trimmers and the like. The other three categories cover boats, trains and off-road cycles.

Some categories, like the one for small engines, are relatively indefinite as to specific allowable emission levels, but Sessa said the standards for off-road heavy-duty vehicles were easier to develop because

(See CLEAN, pg. 22)

Industries Band Together To Pursue Emission Goals

By SCOTT NESBITT

If politics truly does create strange bedfellows, then the issue of legislating emissions for off-road vehicles must certainly fit the definition.

Rather than each manufacturer heading off in its own direction in dealing with the California Air Resources Board and the legislative bodies in the nation's capital, major manufacturers and industry associations have banded together as the Off-Highway Mobile Equipment Coalition.

The lead role has been taken by the Equipment Manufacturers Institute, as when EMI President Emmett Barker testified last September before a Senate subcommittee that was considering clean air legislation. Coalition members include J I Case Co., Caterpillar Inc., Deere & Co., Ford New Holland Inc., Kubota Tractor Inc., Engine Manufacturers Association, Construction Industry Manufacturers Association, National Marine Manufacturers Association and Westinghouse Electric's Thermo King division, a maker of diesel-powered refrigeration units used in highway trucks.

The coalition's founding statement of principles argues:

—"It is not appropriate or workable to require that off-road diesel engines meet the same emission standards and compliance timetables that are mandated for on-road diesel engines. The differences with regard to engine function, engine size, engine configuration, and low engine production volume require both different control strategies and different testing methods.

—"We believe that a comprehensive and reliable study of the non-road equipment industry's contribution to air quality problems is essential prior to any reasonable program of regulation. Such a study would provide a much sounder basis than now exists for deciding whether and what emissions controls on non-road engines are justified. If upon reviewing the results of a thorough study, the EPA administrator concludes that controls are warranted, he should have the authority to impose them, after taking the following factors into account: The expected improvement in air quality; the time required to develop safe and effective emissions control technologies, apply them to a wide range of dissimilar engines, retool, produce and install the redesigned engines; the time required to develop test cycles that reasonably represent the wide variety of duty cycles found in non-road vehicles; and the costs of compliance to the industry and its customers."

—"Any authorizing legislation should contain preemptive language for off-road engine emission regulations. The complexities and low-volume problems previously mentioned above make even more acute the problem of trying to satisfy different requirements in many different states."

INDUSTRY UPDATE

Deutz-Allis's Ratliff: $7.2 Million in 1990

ROBERT J. Ratliff, president and chief executive officer of Deutz-Allis Corp., told a group of dealers that the company plans to make a profit in 1990 of $7.2 million after interest and taxes.

In 1989, D-A had a loss of $1.6 million after interest and taxes, said Ratliff. "Keep in mind that in 1987, we experienced a loss greater than $85 million and in 1988, there was a loss of more than $28 million."

He said that the plan to reach profitability this year is "pretty much based on a no-nonsense business-as-usual philosophy, which doesn't expect significant growth from 1989, despite forecasts of an improved market this year."

He said that some 1989 expense items will not be repeated this year. The company put $8 million into the Gleaner Combine plant at Independence, Mo., "including rearranging the production line, installing machine centers and adding new pieces of equipment." Also involved were overtime costs to keep combine production going while the plant was being upgraded.

The company also had some extra costs in modifying and updating its Parts Distribution Div. at Batavia, Ill.

Ratliff made the remarks to 100 top Deutz-Allis dealers in February at Sanibel Island, Fla. □

Sales remain strong through 1st quarter

U.S. - UNIT RETAIL SALES

Equipment	March 1990	March 1989	% Change	January-March 1990	January-March 1989	% Change
Farm Wheel Tractors:						
2-Wheel Drive						
Under 40 HP	3,722	3,975	(6.4)	8,174	8,426	(3.0)
40 & Under 100 HP	3,466	3,275	5.8	8,191	7,600	7.8
100 HP & Over	2,702	1,900	42.2	6,024	4,944	21.8
Total 2-Wheel Drive	9,890	9,150	8.1	22,389	20,970	6.8
Total 4-Wheel Drive	484	368	31.7	1,131	947	19.4
Total Farm Wheel Tractors	10,374	9,518	8.9	23,520	21,917	7.3
Combines (Self-Propelled)	618	317	95.0	1,402	878	82.5

EMI Courtship With CIMA Appears Finally Over

A VOTE by the Construction Industry Manufacturers Association on March 20 firmly rejected a proposal to join CIMA with the Equipment Manufacturers Institute, 71 against and 37 in favor.

In a letter to Phil Jenkins, EMI chairman, Ronald W. Davis, chairman of CIMA, said: "Unfortunately, there were more barriers to overcome (in our efforts to develop a single trade association to represent the interests of the construction industry) than we were able to deal with....It is my sincere hope that our two associations can set any differences aside and find a way to work together on those issues and problems that are of mutual concern."

In a separate news release, CIMA announced establishment of a group for "light equipment manufacturers." The group is intended to provide services specifically for manufacturers of hand-held, walk-behind and portable construction equipment.

CIMA is based at 111 E. Wisconsin Ave., Suite 940, Milwaukee, Wis. 53202, telephone 414/272-0943. EMI is based at 410 N. Michigan Ave., Chicago, Ill. 60611, telephone 312/321-1470. □

MF's 1989 Net Sales Over $1.28 million

IN THE fiscal year ended Jan. 31, 1990, Massey-Ferguson had net sales of $1.284 million, down $39 million from the $1.323 million posted for the prior year. MF is a part of Varity Corp.

MF's sister company, Perkins Engines, had a $47 million sales increase during the year, producing $621 million in volume. Automotive products experienced a $125 million increase to $437 million and sales of other Varity operations declined from $76 million to $40 million.

Varity had total net sales of $2.382 billion, a $97 million increase on the previous fiscal year. Net income rose from $82 million to $92 million.

Victor Rice, chairman and chief executive officer, said the MF and Perkins groups improved already impressive performances. "While worldwide industry retail sales of farm machinery remained virtually level," he said, "MF raised operating income due to higher margins, the result of a more profitable sales mix and continuing focus on rigid cost controls. At the same time, revenues dipped slightly as a result of weakened demand for industrial machinery. Perkins, including Pacoma hydraulic products, registered higher sales, largely as a consequence of new customers...." □

Britain, Italy Dominate Production

By MICHAEL WILLIAMS

BRITAIN IS still at the top of the West European league table for tractor production after 40 years, but the big numbers are all from the North America-based multinational companies.

The British-owned County, Marshall and Track Marshall brands make only a small contribution.

Italy is second in the league, with an increase in production from the SAME-Hurlimann-Lamborghini factory helping to cancel out the downturn at Fiat and Landini. Germany is Europe's third biggest producer, but production there has been moving downward.

Massey-Ferguson remains the biggest producer, claiming about 20 percent of tractor production in the western world, followed by Fiat, Ford New Holland and Case-IH.

Among the tractor brand names that were once part of the scene that have since disappeared: Italy's Torelli and Slanzi, France's Simca, Sweden's Volvo, Britain's Muir Hill, David Brown and Fordson.

Production in Western Europe is expected to stay at existing levels or show a small increase over the next two years. But in the long term, there is some concern that the easing of trade barriers with Eastern Bloc nations could mean increased sales of low-priced tractors (U.S.S.R.'s Belarus (Belo Cornelly), Universal (Romania), Ursus (Poland), Zetor (Czechoslovakia), and IMT and Steyr (Yugoslavia) tractors in the west. □

European Tractor Makers: Who and Where (1988 Production)

Country	Britain	Italy	W. Germany	France	Others	Total
Massey-Ferguson	51,000	10,000		5,800	200	67,000
Fiat		51,500			2,500	54,000
Ford New Holland	42,000				3,500	45,500
Case-IH	15,000	200	9,000	7,800		32,000
Deere			26,000		5,000	31,000
SAME group		17,000				17,000
KRD (Deutz + MB-trac)			17,000			17,000
Fendt			11,000			11,000
Renault		500		7,500		8,000
Steyr					7,000	7,000
Valmet					5,000	5,000
Landini		4,050		50		4,100
Ebro					4,000	4,000
Others	900	5,500	300		200	6,900
Total	108,900	88,750	63,300	21,150	27,400	309,500

1989 UNIT SALES OF FARM WHEEL TRACTORS

BY PTO HORSEPOWER CATEGORY AND STATE

State	Two-Wheel Drive Tractors: Under 20	20 & Under 30	30 & Under 40	40 & Under 50	50 & Under 60	60 & Under 70	70 & Under 80	80 & Under 90	90 & Under 100	100 & Under 110	110 & Under 120	120 & Under 130	130 & Under 140	140 & Under 150	150 & Under 160	160 & Under 180	180 & Over	Total 2 WD	Four-Wheel Drive Tractors: Under 200	200 & Under 250	250 & Over	Total All 4 WD	Total 2 WD	Total Farm Tractor	State
Alabama	551	632	305	426	302	163	172	115	19	30	5	40	5	48	24	21	16	2,874	1	1	2	4	2,874	2,878	Alabama
Alaska	9	5	2	--	2	--	--	--	--	--	--	--	--	--	--	--	--	18	--	--	--	--	18	18	Alaska
Arizona	80	50	29	26	24	34	90	131	9	42	12	47	34	43	37	33	84	805	1	14	5	20	805	825	Arizona
Arkansas	537	494	198	273	328	234	235	87	17	12	6	4	6	64	132	273	542	3,442	20	45	113	178	3,442	3,620	Arkansas
California	1,082	1,376	386	244	355	375	796	555	187	35	24	74	98	64	77	87	156	5,971	10	158	68	235	5,971	6,207	California
Colorado	158	104	64	27	47	33	23	24	9	6	8	16	22	67	32	78	77	795	33	21	55	109	795	904	Colorado
Connecticut	250	201	95	43	34	9	16	4	8	3	--	2	--	7	--	1	--	674	--	--	--	--	674	674	Connecticut
Delaware	117	111	28	26	28	19	24	4	3	3	2	2	7	9	7	11	8	409	3	2	12	17	409	426	Delaware
Florida	758	765	424	458	251	326	370	525	86	63	13	38	14	66	17	22	39	4,235	47	24	27	98	4,235	4,333	Florida
Georgia	733	747	460	589	461	243	354	272	66	39	8	97	36	162	60	84	80	4,491	4	3	4	11	4,491	4,502	Georgia
Hawaii	55	65	37	19	6	7	14	3	--	--	--	--	--	--	--	--	--	206	--	4	--	4	206	210	Hawaii
Idaho	52	84	24	14	63	33	50	25	10	7	14	23	37	78	51	65	174	805	33	12	25	71	805	876	Idaho
Illinois	729	409	131	147	239	179	175	116	24	30	34	67	99	263	234	264	224	3,364	66	78	178	322	3,364	3,686	Illinois
Indiana	656	466	153	255	141	136	91	94	19	15	17	39	48	125	117	159	162	2,694	31	48	116	195	2,694	2,889	Indiana
Iowa	169	92	31	54	58	117	143	106	41	81	44	134	173	432	321	273	220	2,489	54	25	82	161	2,489	2,650	Iowa
Kansas	235	128	39	63	44	76	65	49	23	54	29	85	46	205	154	203	267	1,767	75	62	155	293	1,767	2,060	Kansas
Kentucky	517	326	218	485	447	362	214	172	24	19	2	17	11	30	14	27	38	2,923	3	3	28	34	2,923	2,957	Kentucky
Louisiana	538	497	150	138	87	178	142	76	12	7	23	35	15	15	58	160	166	2,297	25	27	27	79	2,297	2,375	Louisiana
Maine	247	197	87	33	36	27	13	10	4	7	1	5	5	11	6	6	--	695	--	--	1	1	695	696	Maine
Maryland	690	462	206	128	113	70	59	37	12	7	9	15	9	20	8	11	13	1,869	6	--	2	8	1,869	1,877	Maryland
Massachusetts	256	181	88	43	25	23	10	11	5	3	1	2	--	1	--	1	--	650	--	--	--	--	650	650	Massachusetts
Michigan	837	576	221	130	174	197	98	85	21	28	20	29	32	94	63	51	57	2,713	33	13	58	104	2,713	2,817	Michigan
Minnesota	225	99	60	48	76	88	150	143	38	66	42	89	114	237	216	169	105	1,965	83	75	153	311	1,965	2,276	Minnesota
Mississippi	253	359	194	219	199	184	175	102	21	30	4	20	38	37	103	197	336	2,471	1	10	20	31	2,471	2,502	Mississippi
Missouri	602	350	139	234	235	257	243	185	39	61	38	53	44	133	159	102	182	3,056	19	24	76	119	3,056	3,175	Missouri
Montana	51	54	13	7	13	14	26	47	31	21	18	27	14	44	17	30	18	443	75	26	45	147	443	590	Montana
Nebraska	66	41	16	31	27	18	50	61	23	42	30	74	91	306	245	241	252	1,614	72	20	54	146	1,614	1,760	Nebraska
Nevada	28	33	8	5	7	4	7	4	1	4	--	2	1	2	1	2	2	111	--	3	--	3	111	114	Nevada
New Hampshire	278	251	94	32	28	15	11	5	5	2	1	--	1	1	1	--	--	725	1	--	--	1	725	726	New Hampshire
New Jersey	309	326	181	87	47	36	38	18	4	2	1	--	4	2	4	1	--	1,068	4	--	--	4	1,068	1,072	New Jersey
New Mexico	57	73	76	46	11	19	15	50	9	13	2	12	4	31	14	9	14	455	3	1	5	9	455	464	New Mexico
New York	987	877	317	148	250	207	139	169	47	28	16	39	52	50	46	20	18	3,410	17	7	13	37	3,410	3,447	New York
North Carolina	1,037	887	505	665	448	244	296	249	124	49	18	82	44	106	68	56	77	4,955	9	1	17	27	4,955	4,982	North Carolina
North Dakota	72	30	10	9	16	24	20	36	24	22	21	39	59	138	114	105	85	805	75	80	241	397	805	1,202	North Dakota
Ohio	1,272	678	208	196	290	238	205	130	32	23	21	43	53	125	114	77	78	3,783	23	24	38	85	3,783	3,868	Ohio
Oklahoma	358	272	72	110	130	116	114	92	17	28	9	34	21	138	65	63	42	1,682	50	42	116	208	1,682	1,890	Oklahoma
Oregon	556	394	121	89	128	90	72	75	13	15	7	23	6	61	16	25	29	1,720	16	19	25	60	1,720	1,780	Oregon
Pennsylvania	1,617	938	334	220	190	212	153	102	58	28	19	34	32	27	23	10	10	4,007	15	2	1	18	4,007	4,025	Pennsylvania
Rhode Island	35	23	13	3	3	2	4	--	--	--	--	--	--	--	--	--	--	83	--	--	--	--	83	83	Rhode Island
South Carolina	599	474	316	380	157	143	121	102	38	8	2	17	3	34	18	27	25	2,465	4	--	4	8	2,465	2,473	South Carolina
South Dakota	34	23	18	16	30	31	47	30	39	50	46	74	111	173	120	103	80	1,023	98	32	93	223	1,023	1,246	South Dakota
Tennessee	845	654	326	482	414	318	249	113	24	18	4	26	18	69	73	90	91	3,814	4	3	27	34	3,814	3,848	Tennessee
Texas	1,149	1,016	417	566	394	548	547	348	61	68	25	61	102	344	281	360	431	6,718	29	39	78	146	6,718	6,864	Texas
Utah	48	55	24	25	28	34	41	26	10	5	3	7	11	5	5	5	9	342	8	--	--	8	342	350	Utah
Vermont	200	133	61	24	30	44	22	27	18	1	1	7	--	9	1	1	1	580	1	--	--	1	580	581	Vermont
Virginia	943	718	400	382	409	218	205	128	34	19	12	26	12	34	20	12	7	3,579	2	--	1	3	3,579	3,582	Virginia
Washington	350	336	100	149	257	135	58	64	16	5	1	23	14	40	18	21	40	1,627	13	41	33	87	1,627	1,714	Washington
West Virginia	193	98	85	95	65	49	32	7	3	1	--	--	--	1	--	--	--	631	1	--	--	1	631	632	West Virginia
Wisconsin	272	209	77	85	154	237	286	198	96	78	63	89	115	146	119	68	81	2,373	29	4	26	59	2,373	2,432	Wisconsin
Wyoming	7	10	7	7	14	13	7	16	11	7	--	8	5	28	9	7	9	165	24	2	--	25	165	191	Wyoming
U.S. Government	--	--	44	7	--	3	--	--	--	--	--	--	--	--	--	--	--	54	1	--	--	1	54	55	U.S. Government
Miscellaneous	35	140	62	37	--	31	169	35	--	--	--	--	--	--	--	--	--	509	--	5	--	5	509	515	Miscellaneous
U.S. TOTAL	21,734	17,319	7,673	8,026	7,316	6,413	6,657	5,063	1,435	1,186	674	1,688	1,666	4,126	3,285	3,433	4,325	16,2619	1,125	1,001	2,025	4,151	182.419	106,570	U.S. TOTAL

DATA SOURCE: Farm & Industrial Equipment Institute. Figures do not include garden tractors, motor tillers or contractor's off-highway types. Report includes units marketed by these firms. Case International, Deere, Deutz-Allis, Ford New Holland, Hesston, Kubota, Long, Massey-Ferguson, SAME, Steiger, Versatile, White-New Idea and Yanmar. Sales reported as miscellaneous are retail sales which cannot be classified by state or as U.S. government. They include sales and dispositions that do not go through usual marketing channels such as gifts to non-profit organizations, intra-plant or company transfers, etc.